

MONTANA STATE PLAN & POLICY MANUAL
CHAPTER EIGHT

Policy Number: 8.6

Issuing Benefits

Effective/Revised Date: October 1, 2012

Title: Issuing Benefits

Purpose

Provide guidance on benefit issuance.

Authority

7CFR 246.12 (r)

Policy

Appropriate benefits will be issued to participants.

I. Benefit Issuance Frequency

- A. The CPA or RD determines how many months' worth of benefits a participant receives.
 - 1. Issuing multiple months of benefits is encouraged.
- B. Participants in foster care will only be issued benefits on a monthly basis.
 - 1. The exception to this is when a participant is in a long-term foster care placement.

II. Benefit Issuance

- A. Pre-printing benefits is prohibited.
- B. Local agency staff will preview benefits before printing.
- C. After benefits have been printed:
 - 1. Participant or authorized representative/proxy will review benefits for accuracy of the food package they selected.
 - 2. Participant or authorized representative/proxy will sign signature pad.
 - a. If the signature was not captured on the signature pad, the participant or authorized representative/proxy will sign the [Alternate Means of Signature for Benefits](#) form.
 - b. This form will then be scanned into the participant's folder.
- D. Local agency staff will educate participants on use of WIC benefits.
- E. Participant Program Booklet
 - 1. Will be used by all local clinics.

2. Will be signed by the participant/guardian in presence of WIC staff.
3. Will have active participant's names and ID numbers.
4. Will include the clinic address and telephone number.
5. Any person authorized by the participant/guardian may redeem benefits as long as they have signed the ID page prior to redemption.

III. Food Package Changes within a Benefit Cycle

- A. Benefits for children or women requiring a change of food item may be reissued even if one or more benefits have been redeemed. Example: A change from regular milk to lactose-free milk.
 1. A new partial food prescription will need to be created.
 - a. The amount of food reissued will take into account amount already redeemed.
 - b. The remaining food will not exceed the maximum monthly allowance, taking into account the amount already received on redeemed benefits.
 2. Create a full future food package including appropriate changes.
- B. Change due to addition of Food Package III item.
 1. A Food Package III prescription item (i.e. formula) can be issued to an existing food package.
 2. Staff will need to create a food package with only the prescription item in it.
 3. Staff will then need to Add/Replace additional benefit.
 4. Create a full future Food Package III including appropriate changes.
- C. A formula amount change for infant's mid-month.
 1. If mother's breastfeeding status changes in the middle of the month, and she requests formula, she will keep her benefits and be given the appropriate [End of Certification/Notice of Ineligibility](#) Attachment.
 - a. The infant will receive the appropriate pro-rated food package.

IV. Void/Reissue

- A. Benefits to be voided will be in hand.

- B. Add food package.
- C. Void benefits.
- D. Replace voided benefits.
- E. Proration could result.

V. Benefit Over-Issuance

- A. An over-issuance is any instance where more than the maximum allowable benefit is issued for a benefit period.
- B. Per the contract between the local agency and the state office, the local agency is responsible for any WIC funds misspent due to over-issuance.
- C. For over-issued benefits, the state office will charge the local agency for the value of the over-issuance.
- D. Monetary penalties are reflected as a reduction in the monthly WIC Expenditure Report for the local agency.

VI. Mailing Benefits

- A. Benefits may be mailed to a certified participant/guardian at the discretion of the local agency.
- B. Before mailing benefits, the following will be verified:
 - 1. Appropriate nutrition education and/or breastfeeding education is provided and up-to-date.
 - 2. Required anthropometric measurements have been taken or provided.
 - 3. Appropriate referrals have been made.
 - 4. Follow-up appointment has been scheduled.
 - 5. The participant/guardian's mailing address is confirmed.
 - 6. Participant/guardian is informed mailed benefits will not be replaced.
- C. WIC staff will print and sign for benefits and appropriately indicate in the system benefits were mailed.
- D. Benefits will be mailed first class.
 - 1. Envelopes will have the return address of the local clinic.
 - 2. Envelopes will "Do Not Forward, Return to Sender" stamped/written on them.

- E. A log will be maintained for all mailed WIC benefits indicating:
 - 1. Name and ID number of participant
 - 2. Actual date of mailing
 - 3. Signature of staff person mailing the benefits.
- F. A returned benefit log will be maintained indicating:
 - 1. Name and ID number of participant.
 - 2. Serial numbers of returned benefits.
 - 3. Date of return.
 - 4. Follow-up action (such as voided benefits).
- G. If a participant/guardian claims he/she did not receive the benefits, the local clinic will verify benefits were mailed.
 - 1. Benefits will not be replaced.
- H. If a program booklet needs to be mailed as well, mail it separately from the benefits to prevent fraud.

VII. Authorized Representative/Proxy

- A. Authorized representatives are designated by the participant/guardian in the participant's folder and have the authority to attend any WIC appointments and to pick up and sign for benefits.
 - 1. Authorized representatives do not need to have a note from the participant/guardian to perform these functions, but they will present a picture ID which will then be scanned into the participant's folder.
 - 2. Authorized representatives will be able to provide any information necessary to complete the appointment.
- B. Proxies have the authority to attend any WIC appointments and to pick up and sign for benefits, but will have a signed and dated note by the participant/guardian at the time of appointment.
 - 1. Proxies will present a picture ID which will then be scanned into the participant's folder.
 - 2. Proxies will present a signed and dated note each time they attend an appointment for a participant/guardian.
 - 3. Notes will be scanned into the participant's folder.

4. Proxies will be able to provide any information necessary to complete the appointment.
 5. If a participant/guardian is consistently using the same proxy to attend appointments, they may want to consider changing them to an authorized representative in the participant's folder.
- C. Local agency staff will not act as authorized representatives or proxies for any participant/guardian.
- D. The participant/guardian is responsible for the authorized representative and/or proxy's actions.
1. The participant/guardian will instruct the authorized representative and/or proxy on the use of WIC benefits.
 2. If the authorized representative or proxy commits fraud/abuse, the participant/guardian will be held responsible and sanctioned accordingly.